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PSCNOTE 5000  
24 OCT 2003  
CANCELLED: 24 OCT 2004

# PERSONNEL SERVICE CENTER NOTICE 5000

**Subj: BAH, DEPENDENCY AND EMERGENCY DATA FORMS AND REPORTS**

Ref: (a) Personnel and Pay Procedures Manual, PSCINST M1000.2(series)  
(b) U. S. Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap. 3-F  
(c) Coast Guard Personnel Manual, COMDTINST M1000.6(series), Chap 18-A

1. **Purpose.** This notice publishes changes to the process and procedures, described in Chapter 5 of reference (a), for the maintenance and annual verification of Basic Allowance for Housing (BAH), dependency and emergency data.
2. **Action.** Follow the procedures set forth in this notice to ensure compliance with the requirements in references (b) and (c) for the maintenance and annual validation of BAH, dependency and emergency data.
3. **Directives Affected.** The contents of this notice will be incorporated in the next change to reference (a).
4. **Discussion.** The BAH/Dependency/Emergency Data form, CG-4170A, has been used for many years as the vehicle for recording and verifying a member's dependency and emergency data. The CG-4170A is a computer-generated form, which only Servicing Personnel Offices/PERSRUs can print or modify.
  - a. While some of the information on the CG-4170A, such as dependency data, must be keyed into the pay and personnel system to facilitate accurate payment of BAH and other entitlements, there is no requirement to maintain (in the pay and personnel system) designation of beneficiaries for the *Death Gratuity, Unpaid Pay and Allowances* or *Person to Receive an Allotment of Pay if Missing or Unable to Transmit Funds*. Such designations must be made in writing, signed by the member and witnessed. CG PSC-2020D, Designation of Beneficiaries, has been developed for this purpose.

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[illegible]

- b. CG PSC-2020, Dependency Worksheet will continue to be used as the source document for recording dependents for BAH entitlement purposes. Dependency data is entered into PeopleSoft by Servicing Personnel Offices/PERSRUs. Computer-generated BAH/Dependency forms are available in PeopleSoft to facilitate the annual validation required by reference (b). The computer-generated BAH/Dependency forms will also be used to record approval of dependents by PSC (LGL) when required.
5. **Process.** This section provides an overview of the process for updating and validating BAH, dependency, beneficiary designations and emergency contact information.
- a. **BAH/Dependency Information.** Per reference (a), BAH/Dependency information, must be provided to the Servicing Personnel Office/PERSRU by all active duty and reserve members and cadets upon:
- Initial entry into the Coast Guard or Coast Guard Reserve
  - Reenlistment after a break in service
  - Change in status from enlisted to officer or officer to enlisted
  - Recall to active duty of retired members
  - Reporting to a new Permanent Duty Station
  - Anytime a member acquires initial or additional dependents
  - When any material change occurs in dependency status. (Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)
- (1) Form CG PSC-2020, Dependency Worksheet, is the source document for BAH/Dependency information. The Servicing Personnel Office/PERSRU will enter the dependency data in PeopleSoft and generate the BAH/Dependency form (old CG-4170A) for the member's signature. The signed BAH/Dependency form is then filed in the PERSRU PDR.
- b. **Beneficiary Designations.** Beneficiaries for Death Gratuity, Unpaid Pay and Allowances and Person to Receive Allotment of Pay if Missing or Unable to Transmit Funds are designated by the member on form CG PSC-2020D, Beneficiary Designations. A CG PSC-2020D must be completed and forwarded to the Servicing Personnel Office/PERSRU by all active duty and reserve members and cadets per paragraph 5.a (above) and when the member desires to change beneficiary designations. Beneficiary designation policy can be found in Chapter 18 of reference (c).
- (1) The original signed, witnessed, CG PSC-2020D is filed in the PERSRU PDR. Units that maintain unit PDRs should retain a copy for filing in the unit PDR.
- c. **SGLI/Family SGLI Elections and Beneficiary Designations.** Servicemembers' Group Life Insurance (SGLI) and Family SGLI elections and designation of beneficiaries are made using SGLV Forms 8286 and 8286a. These forms are completed by the member and forwarded to the Servicing Personnel Office/PERSRU where the member's election is recorded for payroll deduction purposes. Beneficiary data is not entered in PeopleSoft, only the member's election

and, if applicable, coverage amounts are recorded. SGLI elections must be verified per paragraph 5.a (above).

- d. **Emergency Contacts Information.** The member enters and reviews their Emergency contacts information in PeopleSoft or, in the case of units with insufficient connectivity a supporting unit can print the Emergency Contact Information report and send to the member or unit for verification. The user can either update the information using PeopleSoft self-service, or make the necessary changes and return to the support unit for data entry.
6. **Annual Validation of BAH/Dependency and Emergency Data.** Per reference (b) members must verify their BAH entitlement and certify dependent status annually during the month of November. Member's beneficiary designations and emergency contacts are also certified annually in November.
    - a. Servicing Personnel Offices/PERSRUs and units (if they have the administrative capability) may utilize the CG-4170A annual validation process prescribed on page 5-C-2 of reference (a) to complete the annual validation. New CG-4170A forms can no longer be created. The form has been replaced, in PeopleSoft, by the BAH/Dependency Data form and the Emergency Contact Information report. If the member notes the need for any corrections or changes to the beneficiary designations sections of the CG-4170A, a CG PSC-2020D, Designation of Beneficiaries, must be completed and forwarded to the Servicing Personnel Office/PERSRU. If changes to BAH eligible dependent data are required a CG PSC-2020, BAH/Dependency Worksheet, must be completed and forwarded to the Servicing Personnel Office/PERSRU. The Servicing Personnel Office/PERSRU will enter the dependency changes in PeopleSoft and generate a BAH/Dependency Data form for the member's signature.
    - b. The new computer-generated BAH/Dependency Data form and Emergency Contact Information report may be used in place of CG-4170A for annual validation. Both the form and the report can be printed for all members of a unit at the same time, eliminating the need to remove and copy forms from the members' records. However, if the computer-generated forms and reports are used, units must provide members with blank CG PSC-2020D, Beneficiary Designation, forms in order to record their beneficiary designations.
  7. **Forms/Reports.**
    - a. **CG PSC-2020D, Designation of Beneficiaries.** CG PSC-2020D is available on PSC's Internet site - <http://www.uscg.mil/hq/psc/forms>.
      - (1) The form is in Adobe Acrobat file format and can be filled out online and printed. The form can be filled in by hand if necessary. However, all entries must be legible. Enclosure (1) to this notice provides a sample of the new form.
    - b. **CG PSC-2020, Dependency Worksheet:** CG PSC-2020D is available in enclosure (1) to reference (a) or, from the PSC Internet site.

- c. **BAH/Dependency Data Form (Computer-Generated).** Servicing Personnel Office/PERSRU and Command users may print the BAH/Dependency Data form, either individually or for all members assigned to a unit, by following this menu path in PeopleSoft:

[Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use Dependency/Emergency Data](#).

This will open the Dependency/Emergency Data activity guide. The activity guide has links for generating the form. A sample form is included as enclosure (2) to this notice. Refer to the PeopleSoft online help for detailed procedures:

<http://www.uscg.mil/hq/psc/ps>

- d. **Emergency Contact Information Report.** Servicing Personnel Office/PERSRU and Command users may print the Emergency Contact Information report, either individually or for all members assigned to a unit, by following the procedure in paragraph 6.c (above). A sample report is included as enclosure (3) to this notice.
- e. **Servicemembers' Group Life Insurance (SGLI) forms.** SGLV forms 8286 (SGLI Elections) and 8286A (Family SGLI Elections) are available by following the links on PSC's Internet forms page or directly from the Office of Servicemembers' Group Life Insurance Internet site at:

<http://www.insurance.va.gov/sgliSite/forms/forms.htm>

The September 2003 revision to the SGLV-8286 form includes a continuation sheet which provides additional space for recording multiple beneficiaries. The new form should be used in lieu of listing additional beneficiaries on plain paper.

/s/  
M. P. SULLIVAN  
Acting

Encl: (1) CG form PSC-2020D, Designation of Beneficiaries  
(2) Example BAH/Dependency Report  
(3) Example Emergency Contact Report

<b>Department of Homeland Security</b> U. S. Coast Guard <b>CG PSC-2020D (Rev. 10/03)</b>	<h2 style="margin: 0;">Designation of Beneficiaries</h2>		
<b>Purpose:</b> To designate your beneficiaries for gratuity pay, unpaid pay and allowances, or person to receive allotment of pay if missing or unable to transmit funds. This form replaces the applicable portions of form CG-4170A (Computer Generated).			
This form <u>does not</u> designate Servicemembers' Group Life Insurance (SGLI) beneficiaries. Whenever you have a dependency change (i.e. spouse), you should also review SGLI beneficiary information. You change your SGLI beneficiary(ies) by completing a new SGLV-8286 ( <a href="http://www.insurance.va.gov/sqliSite/forms/forms.htm">http://www.insurance.va.gov/sqliSite/forms/forms.htm</a> ).			
<b>SECTION I – MEMBER DATA</b>			
1. Name (last, first, middle):	2. Employee ID:		
3. Rate/Rank:	4. Unit:		
<b>SECTION II - BENEFICIARY FOR GRATUITY PAY IN EVENT THERE IS NO SURVIVING SPOUSE OR ELIGIBLE CHILDREN</b> Your spouse and eligible children are automatically designated by law as the beneficiary of your death gratuity, if they are alive after you die. Do not list your spouse or children here. In this section, list the blood relative (Parent or Sibling only) that you want to receive your Death Gratuity, in case your spouse and children are not alive after you die. (SEE REVERSE)			
<b>5</b>	<b>Name (First, MI, Last)</b> 5a.	<b>Address (including zip code) &amp; Phone</b> 5b.	<b>Relationship</b> 5c.
Principal		Area Code & Phone:	
Contingent	5d. (Person to receive gratuity if Principal is not alive when you die)	5e.	5f.
		Area Code & Phone:	
<b>SECTION III – BENEFICIARY(IES) FOR UNPAID PAY AND ALLOWANCES (SHARES MUST EQUAL 100%)</b> At least one beneficiary must be entered (SEE REVERSE)			
<b>6</b>	<b>Name (First, MI, Last)</b> 6a.	<b>Address (including zip code) &amp; Phone</b> 6b.	<b>Relationship</b> 6c.
		Area Code & Phone:	6d. %
	6e. (Enter "N/A" if block 6d is 100%)	6f.	6h. %
		Area Code & Phone:	
<b>SECTION IV – PERSON TO RECEIVE ALLOTMENT OF PAY IF MISSING OR UNABLE TO TRANSMIT FUNDS (SEE REVERSE)</b>			
<b>7</b>	<b>Name (First, MI, Last)</b> 7a.	<b>Address (including zip code) &amp; Phone</b> 7b.	<b>Relationship</b> 7c.
		Area Code & Phone:	7d. %
<b>PRIVACY ACT STATEMENT</b> In accordance with 5 USC Section 522a(e)(3), the following information is provided to you when supplying personal information to the U. S. Coast Guard: Authority – 10 USC 1475-1480, 10 USC 2771. Principal Purpose(s) – (1)Person(s) to receive death gratuity, (2) Persons(s) to receive unpaid pay and allowances (arrears in pay). (3)Person to receive allotment of pay if missing or unable to transmit funds. Routine uses – To provide timely pay of certain benefits. Disclosure – Disclosure of this information is voluntary, but failure to provide this information may result in the inability or delay to pay certain benefits.			
8. Member's Signature & Printed Name (first, middle, last):			9. Date Signed:
10. Signature, Name and Title of Witness:			

Distribution: **Original** – Servicing Personnel Office/PERSRU for filing in Section 4 of PERSRU PDR  
**Copy** — File in Section 4 of Unit PDR if unit maintains PDRs

Continued on Next Page →

SECTION V – ANNUAL CERTIFICATION			
Items 5 through 7d Certified Correct.	Date: _____	Member's Signature	_____
Items 5 through 7d Certified Correct.	Date: _____	Member's Signature	_____
Items 5 through 7d Certified Correct.	Date: _____	Member's Signature	_____
Items 5 through 7d Certified Correct.	Date: _____	Member's Signature	_____
Items 5 through 7d Certified Correct.	Date: _____	Member's Signature	_____

### NOTES

All fields must be completed. Do not enter “By Law” or leave any beneficiary designation field blank. “Not Applicable” or “N/A” may be used in item 6e if only one beneficiary for unpaid pay and allowances is desired.

### SECTION II – BENEFICIARY FOR GRATUITY PAY IN EVENT THERE IS NO SURVIVING SPOUSE OR ELIGIBLE CHILDREN

10 U.S.C. 1475-1480, as amended by Public Law 102-190, authorizes paying a Death Gratuity to the survivors of a Coast Guard regular or reserve member, serving with or without pay, who dies:

- While traveling to/from AD/IDT/ADT or while on active duty or while on IDT/ADT
- The survivors of a member who dies within 120 days of their separation date, are also authorized a Death Gratuity, IF the Department of Veterans Affairs (DVA) determines the death was service connected.

**Eligible Survivors and Death Gratuity Order of Precedence:** The following persons are the only eligible survivors who may receive the Death Gratuity. They are paid in the order of precedence listed below. If an eligible survivor dies before receiving the Death Gratuity, it will be paid to the next living eligible survivor in the order of precedence.

1. Lawful spouse.
2. Member's children, regardless of their age or marital status, in equal shares.
3. **Person designated by the member on the CG PSC-2020D.** However, by law the person designated on the CG PSC-2020D must be a relative; either a parent (natural, adoptive, in loco parentis) or sibling (half-sibling, full blood, adopted). If the person designated on the CG PSC-2020D is not a parent or sibling, the designation is ignored and the Death Gratuity is paid to the next eligible survivor in order of precedence.
4. Member's parents, in equal shares.
5. Member's siblings – half-blood, full blood and adopted, in equal shares.

### SECTION III – BENEFICIARY(IES) FOR UNPAID PAY AND ALLOWANCES

Any unpaid pay and allowances, including per diem, travel, transportation of dependents, transportation of household goods, etc., found due a deceased member on date of their death shall be paid to the member's survivors. A member may designate whomever they want to be their beneficiary(ies) for unpaid pay and allowances. If more than one beneficiary is designated, the total of all shares must equal 100%.

**Payment Order of Precedence:** Unpaid pay and allowances will be paid to the member's survivors in the following order of precedence:

- **Beneficiary(ies) designated on Form CG PSC-2020D.**
- Spouse.
- Child (ren) and descendants of deceased children by representation.
- Parents or to the survivor of them.
- Duly appointed legal representative of the deceased member's estate, or if there be none, to the person(s) entitled by the state laws of the deceased members domicile.

### SECTION IV – PERSON TO RECEIVE ALLOTMENT OF PAY IF MISSING OR UNABLE TO TRANSMIT FUNDS

The “Missing Persons Act” provides that pay and allowances continue to accrue to the pay account of any service member for the period he or she is missing or captured and may be paid to the dependents for support. This item reflects the desires of the designator and is used as a guide in the disposition of his/her pay. Allotments to dependents and insurance companies initiated prior to entering a missing status are continued in effect unless unusual circumstances indicate changes.

## BAH/DEPENDENCY DATA

EMPLID <b>100000</b>	NAME <b>Smith, John S.</b>	RATE/RANK <b>Chief Boatswain'S Mate</b>	CURRENT DUTY STATION <b>000000 - CGC UNDERWAY</b>
SERVICING PERSRU <b>000269 - CG GP CHARLESTON</b>		MARITAL STATUS <b>Married</b>	DATE OF MARRIAGE <b>10-JAN-1989</b>
SPOUSE IN SERVICE INFORMATION			

## DEPENDENCY DATA

NAME <b>Smith, Joan T.</b>				SOCIAL SECURITY NUMBER: 555121212
1 BAH ELIGIBLE DEPENDENT	<b>YES</b>	DATE OF BIRTH: <b>15-AUG-1968</b>	DEPENDENCY DATE: <b>10-JAN-1989</b>	RELATIONSHIP: <b>Spouse</b>
NAME <b>Smith, John A.</b>				SOCIAL SECURITY NUMBER: <b>123456789</b>
2 BAH ELIGIBLE DEPENDENT	<b>YES</b>	DATE OF BIRTH: <b>22-AUG-1994</b>	DEPENDENCY DATE: <b>22-AUG-1999</b>	RELATIONSHIP: <b>Son</b>
NAME <b>Smith, Jane, D.</b>				SOCIAL SECURITY NUMBER: <b>987654331</b>
3 BAH ELIGIBLE DEPENDENT	<b>YES</b>	DATE OF BIRTH: <b>30-MAY-1998</b>	DEPENDENCY DATE: <b>30-MAY-1998</b>	RELATIONSHIP: <b>Daughter</b>
NAME				SOCIAL SECURITY NUMBER:
4 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
5 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
6 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
7 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
8 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
9 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:
NAME				SOCIAL SECURITY NUMBER:
10 BAH ELIGIBLE DEPENDENT		DATE OF BIRTH:	DEPENDENCY DATE:	RELATIONSHIP:

## FOR CG PERSONNEL SERVICE CENTER USE ONLY

The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M7220.29(series) The family member(s) listed below are approved for BAH eligibility commencing on the dates(s) indicated:

NBR:	DATE	NBR:	DATE	NBR:	DATE
NBR:	DATE	NBR:	DATE	NBR:	DATE

**PSC APPROVAL SIGNATURE:**

**DATE:**

## MEMBER'S CERTIFICATION

By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of \$10,000 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 287). I further certify that I have reviewed all entries on this form and by signature below, the information contained hereon is correct.

**SIGNATURE OF MEMBER:**

**DATE:**

Department of Homeland Security  
U.S. Coast Guard  
Computer-Generated

## EMERGENCY CONTACT INFORMATION

EMPLID: 1234567                      Rank/Rate: YNC/E7                      Name: Smith, Sean T.  
Duty Station: 000652-CG ISC ST LOUIS                      Servicing HR Site: 000652-CG ISC ST LOUIS  
Marital Status: Married

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In case of emergency, please notify the following people:

Primary Contact:

Name: Smith, Teresa W                      Relationship: Spouse  
Address: 123 Any Street                      Phone: 555/555-1212  
                    TOPEKA, KS 666144017

Other Phones: 

Type	Number
Business	555/555-1235
Home	555/555-1234

Other Contacts:

Name: Smith, Kirk A.                      Relationship: Father  
Address: 400 Oak Tree Lane #2                      Phone: 354/223-1234  
                    ANYCITY, LA 70000

Other Phones: 

Type	Number
Home	354/223-1234

Name: Jones, Linda A.                      Relationship: Mother  
Address: 222 MY STREET                      Phone: 555/123-1234  
                    HOUSTON, TX 77042

Other Phones: 

Type	Number
Business	555/461-4444
Cellular	555/123-5595
Home	555/123-1234

Name: Smith, Jeffrey P.                      Relationship: Son  
Address: 123 Any Street 312                      Phone: 555/555-6114  
                    TOPEKA, KS 666144017

Name: Smith, Marcus P.                      Relationship: Next of Kin  
Address: 3202 CATFISH HOLLOW LANE                      Phone: 098/555-3456  
                    HOUSTON, TX 77082

Other Phones: 

Type	Number
Business	555/555-3456
Home	098/555-3456



## E-Mail ALPERSRU V/03

**Subj: ANNUAL VERIFICATION OF BAH, DEPENDENCY AND EMERGENCY DATA**

- Ref** (a) [Personnel and Pay Procedures Manual, PSCINST M1000.2\(series\)](#)  
(b) [PSCNOTE 5000, BAH, Dependency and Emergency Data Forms and Reports](#)  
(c) [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#)  
(d) [Coast Guard Personnel Manual, COMDTINST M1000.6\(series\)](#)
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**Introduction** This E-Mail ALPERSRU announces changes to the process, described in Section 5-C-2 of reference (a), for the annual verification of BAH, dependency and emergency data.

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**Background** Reference (b) published new forms and procedures for recording a member's BAH eligible family members and designation of beneficiaries. Designation of beneficiaries for the *Death Gratuity, Unpaid Pay and Allowances* or *Person to Receive an Allotment of Pay if Missing or Unable to Transmit Funds* will now be recorded on CG PSC-2020D, Designation of Beneficiaries form. It is no longer necessary to enter such designations in PeopleSoft.

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**Validation Process** This is how verification of dependency and emergency data will be accomplished using the new BAH/Dependency form and Emergency Contact report.

Stage	Who does it/ When	What Happens
1	SPO/PERSRU Week of 03-07 Nov	Forwards to units:  <ol style="list-style-type: none"><li>1. PeopleSoft BAH/Dependency Forms</li><li>2. PeopleSoft Emergency Contact Information Report</li><li>3. Copies of members' SGLI Election forms (SGLV-8286 &amp; 8286A)</li></ol> <b>Note:</b> If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from PeopleSoft using Command Self-Service access.

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## E-Mail ALPERSRU V/03

**Subj: ANNUAL VERIFICATION OF BAH, DEPENDENCY AND EMERGENCY DATA**

**Validation  
Process (cont'd)**

Stage	Who does it/When	What Happens	
<b>2</b>       <b>Cont'd</b>	<b>Unit/</b> Upon Receipt	Forwards SGLI Forms, BAH/Dependency Forms and Emergency Contact Reports to members for verification. Also provides members with blank, or with instructions to access, CG PSC-2020D, Beneficiary Designations form.	
		<b>If a form or report is</b> not received for a member or is lost or destroyed.	<b>Then</b> 1. Use the PeopleSoft BAH/Dependency Form or Emergency Contacts Report print procedure to generate a new form/report for the member's verification. 2. Provide the member a blank SGLI election form to complete.
<b>3</b>	<b>Member</b> NLT 30 Nov	<ol style="list-style-type: none"> <li>1. Completes CG PSC-2020D, Beneficiary Designation form. Forwards original to SPO/PERSRU, retains copy for Unit PDR if one is maintained.</li> <li>2. Reviews BAH/Dependency Data form for accuracy: <ul style="list-style-type: none"> <li>• Annotates any necessary changes or corrections.</li> <li>• Signs and dates in the "Members Certification" area.</li> <li>• Returns to SPO/PERSRU, includes CG PSC-2020, BAH Dependency Worksheet, and supporting documentation if adding/removing BAH eligible dependents.</li> </ul> </li> <li>3. Reviews Emergency Contacts Report for Accuracy: <ul style="list-style-type: none"> <li>• Enters any changes or corrections in PeopleSoft using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO/PERSRU data entry.</li> </ul> </li> </ol>	

*Continued on next page*

## E-Mail ALPERSRU V/03

Subj: ANNUAL VERIFICATION OF BAH, DEPENDENCY AND EMERGENCY DATA

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**Validation  
Process (cont'd)**

Stage	Who does it/When	What Happens
4	SPO/PERSRU	<p>Enters, into PeopleSoft, any changes or corrections the member noted using the appropriate process:</p> <ul style="list-style-type: none"><li>• <a href="#">Dependent/Beneficiary</a> to add or change information about dependents (Note: Appropriate SDA II entries must be completed if dependency change impacts entitlements). Generates a new BAH/Dependency form and forwards to member for signature.</li><li>• <a href="#">Emergency Contact</a> to add or change emergency contact information</li><li>• <a href="#">Life and AD/D Benefits</a> to make SGLI <b>election</b> changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI <b>election</b>, i.e. increasing, decreasing or declining coverage. No data entry is required if the member is only updating beneficiary designations.)</li></ul> <p>Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of PERSRU PDR.</p>

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**Procedures**

Procedures for maintaining dependency and emergency data and printing forms and reports in PeopleSoft are available in the online help at:

<http://www.uscg.mil/hq/psc/ps/>

An extract of the portions of the online help pertaining to dependency and emergency data is included as enclosure (1).

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## E-Mail ALPERSRU V/03

**Subj: ANNUAL VERIFICATION OF BAH, DEPENDENCY AND EMERGENCY DATA**

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**Failure to  
Complete  
Annual  
Validation**

Per Section 3.B.7.b of reference (c), if a member fails to perform the annual dependency certification, the member loses entitlement to Basic Allowance for Housing (BAH) at the With Dependents rate, and shall be paid BAH at the Without Dependent rate until such time as the member provides proper validation. If a member fails to perform the annual validation, the PERSRU shall notify PSC (MAS) via E-Mail to [HRSIC-MAS@hrrsic.uscg.mil](mailto:HRSIC-MAS@hrrsic.uscg.mil) not later than 31 December 2003.

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**Certification  
Requirements  
for Single  
Member  
Sponsors and  
Military  
Couples With  
Dependents**

Reference (d), Article 4.A.6.g. requires single members with dependents, and military couples with dependents, must also make the following certification on their BAH/Dependency form annually:

*"I certify that I am in compliance with Article 4-A-6.g., Coast Guard Personnel Manual. I have made adequate, proper dependent care arrangements and am available for unrestricted worldwide duty."*

This certification shall be made in the member's certification area of the form.

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**Update of  
DEERS  
Database**

If the member reports a dependency change during review of the BAH/Dependency form, this dependency change shall be reported, as appropriate, in the DEERS database. Additionally, if the member reports a change in residence address, this change in address should be recorded in DEERS as prescribed on pages 5-B-17 and 5-B-18, reference (a).

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**Questions**

Questions regarding the content of this e-Mail ALPERSRU may be directed to PSC Customer Care at (785) 339-2200, or via [e-mail](#).

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**Released by**

Internet release authorized.

/s/  
M. P. SULLIVAN  
Deputy Director

Encl: (1) Dependency and Emergency Data Procedures

## **Dependency and Emergency Data**

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## Dependency/Emergency Data Activity Guide

### Introduction

This section provides the procedures for using the Dependency/Emergency Data Activity Guide to access family information, marital status, SGLI elections, dependency forms, and emergency contact forms.

The Activity Guide simplifies navigation by grouping separate tasks into one area.

### Procedure

Start Internet Explorer, sign into PeopleSoft and follow these steps to access the Activity Guide.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):  <a href="#">Administer Workforce</a> > <a href="#">Administer Workforce (GBL)</a> > <a href="#">Use Dependency/Emergency Data</a>
2	The Dependency/Emergency Data Activity Guide will display. Select the link for the task you want to complete. The link will open a new window, the activity guide will remain open so you can return and select another task without having to navigate the menus again.


The Dependency/Emergency Data Activity Guide:



## Add, Remove or Update Family Information

### Introduction

This process is used to add/or change the status of (BAH) *Basic Allowance for Housing* Eligible Family members. Family members are not deleted from the member's record when their status changes. For example, if a member reports a divorce, you would change the spouse's relationship to "ExSpouse" and de-select the BAH Eligible box on Personal Profile page.

 **Note:** If recording a marriage, divorce or death of a spouse, be sure to update the member's marital status on the Personal Data page.

After the data is entered and saved it can be printed on a BAH/Dependency Form. See [BAH Dependency Form Print Procedure](#) for more information.

### Reference

Before adding a BAH Eligible Family Member you should consult Chapter 3-F of the [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#).

### Pages and Tabs



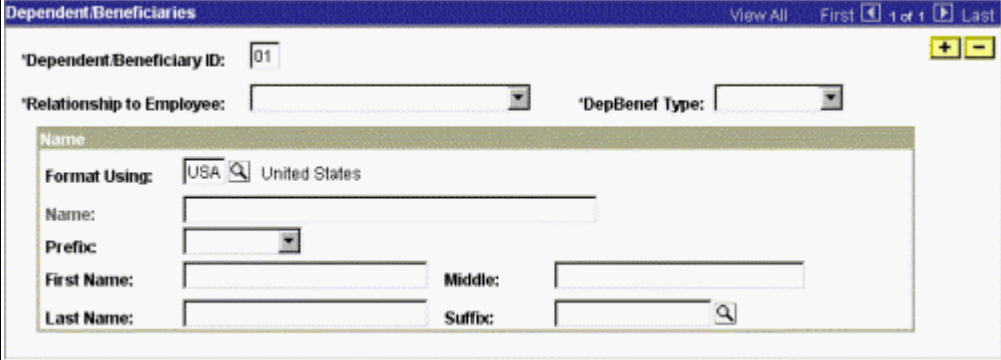

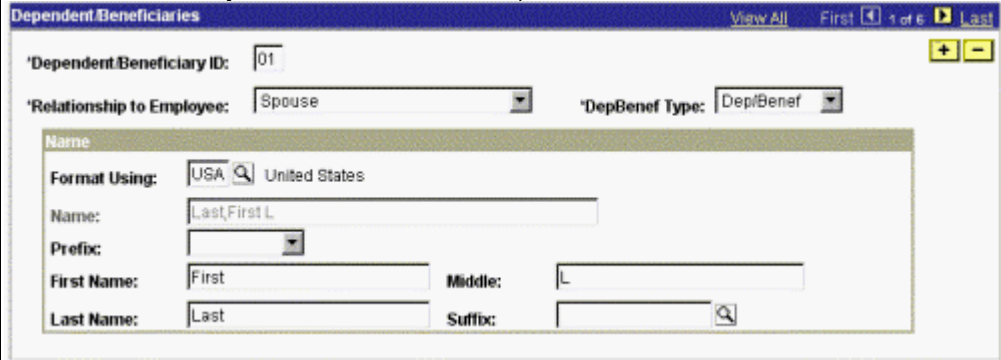
Processing family member/beneficiary information consist of one page and three tabs.



1. The **Name** tab enables you to record the family member or beneficiary name and relationship to the member. You must use the Name tab to add or delete dependent/beneficiary records.
2. The **Address** tab enables you to record the family member or beneficiary address information.
3. The **Personal Profile** tab enables you to record BAH eligibility, birth date and other personal information about the family member or beneficiary.



## Procedure

Step	Action
1	Click the Add, Remove, Update Family Information link on the Dependency Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> <b>When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</b></p>
3	<p>The Dependent/Beneficiary <b>Name</b> tab <i>(The Name tab enables you to record the family member name and relationship to the member)</i> will be displayed.</p> <p>If the member does not have any family members or beneficiaries in the system, the Name tab will open with a new blank row, as shown below.</p>  <p>If you are adding a new family member, you may complete the fields as indicated below.</p> <p> <b>Note:</b> If adding a spouse, be sure to update the member's marital status on the Personal Data page.</p> <p>If the member already has family members or beneficiaries in the system, the Name tab will display the information on Dependent/Beneficiary ID 01 (the first family member/beneficiary in the member's record).</p> 

Step

Action

3

1.

If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active.

View All


First

1 of 6

Last


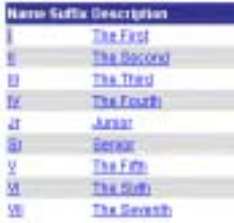

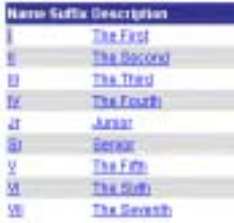

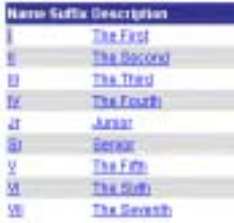
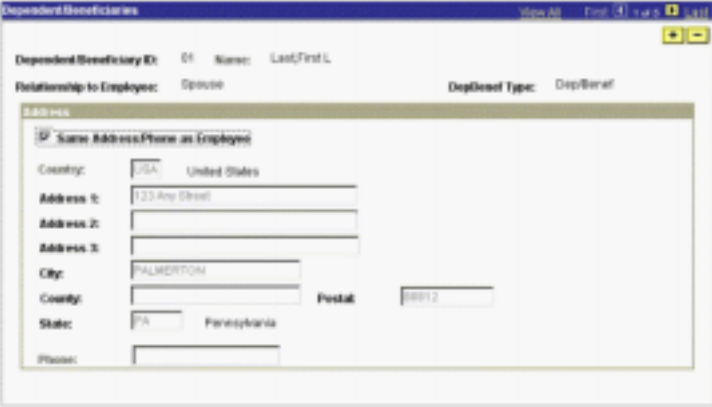


Click on the View All link, Next Arrow button, or the Last link to view additional family members.

2.






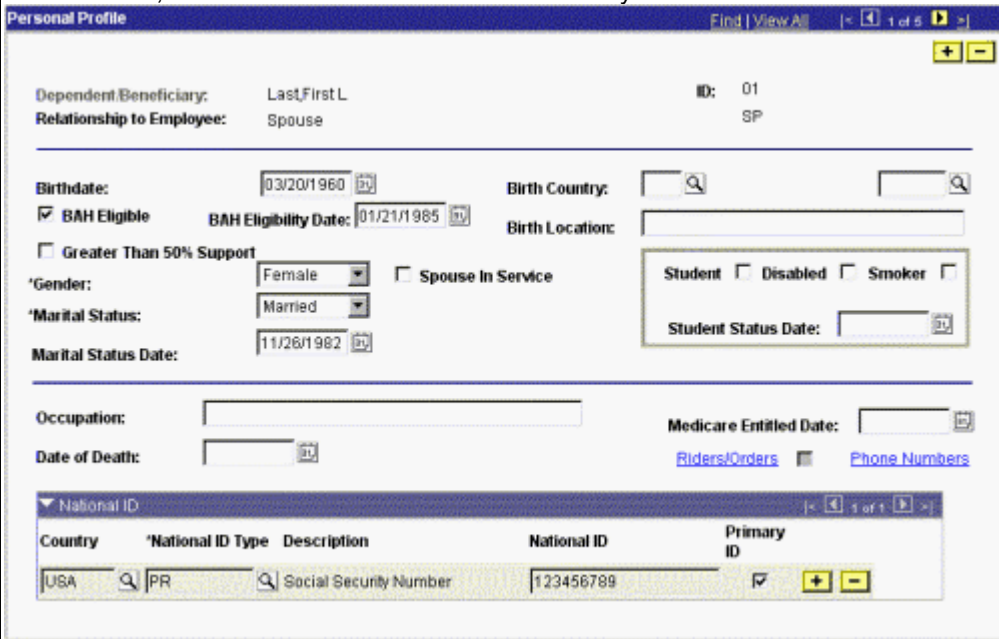
Click the  to add an additional family member, a new blank row will be inserted.

Name Tab Data Entry:



Field	Description/Instructions																																	
Dependent/ Beneficiary ID	PeopleSoft pre-populates this field. It will automatically increment it by 1 for every new record added.																																	
Relationship to Employee	<div>Select a relationship from the drop-down menu. There are several pre-defined values to choose from:</div> <table> <tr> <td>Adopt Daughter</td> <td>Grandchild</td> <td>Niece</td> </tr> <tr> <td>Adopt Son</td> <td>Grandfather</td> <td>Other</td> </tr> <tr> <td>Aunt</td> <td>Grandmother</td> <td>Other Relative</td> </tr> <tr> <td>Brother</td> <td>In Loco Parentis</td> <td>Roommate</td> </tr> <tr> <td>Daughter</td> <td>Legal Guardian</td> <td>Sister</td> </tr> <tr> <td>Employee</td> <td>Legal Ward Daughter</td> <td>Son</td> </tr> <tr> <td>ExSpouse</td> <td>Legal Ward Son</td> <td>Spouse</td> </tr> <tr> <td>Father</td> <td>Mother</td> <td>Step Parent</td> </tr> <tr> <td>Father-in-Law</td> <td>Mother-in-Law</td> <td>Stepchild</td> </tr> <tr> <td>Former Spouse</td> <td>Neighbor</td> <td>Trustee</td> </tr> <tr> <td>Friend</td> <td>Nephew</td> <td>Uncle</td> </tr> </table>	Adopt Daughter	Grandchild	Niece	Adopt Son	Grandfather	Other	Aunt	Grandmother	Other Relative	Brother	In Loco Parentis	Roommate	Daughter	Legal Guardian	Sister	Employee	Legal Ward Daughter	Son	ExSpouse	Legal Ward Son	Spouse	Father	Mother	Step Parent	Father-in-Law	Mother-in-Law	Stepchild	Former Spouse	Neighbor	Trustee	Friend	Nephew	Uncle
Adopt Daughter	Grandchild	Niece																																
Adopt Son	Grandfather	Other																																
Aunt	Grandmother	Other Relative																																
Brother	In Loco Parentis	Roommate																																
Daughter	Legal Guardian	Sister																																
Employee	Legal Ward Daughter	Son																																
ExSpouse	Legal Ward Son	Spouse																																
Father	Mother	Step Parent																																
Father-in-Law	Mother-in-Law	Stepchild																																
Former Spouse	Neighbor	Trustee																																
Friend	Nephew	Uncle																																
Dependent/Benf Type	<div>This field will automatically be filled in based on the type of relationship you selected above. You can change it if necessary, select a dependent/beneficiary type from the drop-down menu. Use:</div> <ul style="list-style-type: none"> <li><b>Benf</b> -- if this person is being added solely as a beneficiary (SGLI, Death Gratuity, etc) and not as a dependent/family member for BAH purposes.</li> <li><b>Dependent/Benf</b> -- if this person is being added as a BAH eligible dependent/family member (Including spouses in member-to-member marriages). This type (DependentBenf) will also allow you to use list the person as a beneficiary for other programs.</li> </ul>																																	
Name	This field will be populated by PeopleSoft after you fill out the other name fields and save the page. It displays the Last Name, First Name, and Middle Initial or complete middle name of the family member/beneficiary.																																	
Prefix	Optional. You may choose a prefix (Mr. Mrs, etc.) from the drop-down menu or leave this field blank.																																	
First Name	Enter the person's first name																																	

Step	Action						
3	<table> <tr> <td>Last Name</td><td>Enter the person's last name</td></tr> <tr> <td>Middle</td><td>Enter the person's middle initial, optionally you may enter the entire middle name if desired.</td></tr> <tr> <td>Suffix</td><td> <p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p>  </td></tr> </table>	Last Name	Enter the person's last name	Middle	Enter the person's middle initial, optionally you may enter the entire middle name if desired.	Suffix	<p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p> 
Last Name	Enter the person's last name						
Middle	Enter the person's middle initial, optionally you may enter the entire middle name if desired.						
Suffix	<p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p> 						
4	<p>Click the Address tab to view, update or change family member address information.</p>  <p>If you have just added or changed family member information in the Name tab, the address data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active.</p> <p><a href="#">View All</a> <a href="#">First</a>  1 of 6  <a href="#">Last</a> . Click on the View All link, Next Arrow button, or the Last link to view additional family members or beneficiaries.</p> <p><b>Address Tab Data Entry:</b></p> <table> <tr> <th>Field</th><th>Description/Instructions</th></tr> <tr> <td>Same Address/ Phone as Employee</td><td> <p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> <li><a href="#">Employee Address and Home of Record</a></li> <li><a href="#">Employee Home and Mailing Address Change</a></li> </ul> <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p> </td></tr> </table>	Field	Description/Instructions	Same Address/ Phone as Employee	<p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> <li><a href="#">Employee Address and Home of Record</a></li> <li><a href="#">Employee Home and Mailing Address Change</a></li> </ul> <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p>		
Field	Description/Instructions						
Same Address/ Phone as Employee	<p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> <li><a href="#">Employee Address and Home of Record</a></li> <li><a href="#">Employee Home and Mailing Address Change</a></li> </ul> <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p>						

## Dependency and Emergency Data



Step	Action														
4	<table border="1"> <tr> <td>Address 1 Address 2 Address 3</td><td>Use these fields to enter the street address, P O Box, apartment number, etc.</td></tr> <tr> <td>City</td><td>Enter the City</td></tr> <tr> <td>County</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr> <tr> <td>State</td><td>Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.</td></tr> <tr> <td>Province</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr> <tr> <td>Postal</td><td>Enter the zip code for U. S. Addresses or postal code for foreign addresses.</td></tr> <tr> <td>Phone</td><td>Enter the Home Phone number of the family member/beneficiary.</td></tr> </table>	Address 1 Address 2 Address 3	Use these fields to enter the street address, P O Box, apartment number, etc.	City	Enter the City	County	Not used for U. S. Addresses, enter if necessary for foreign addresses.	State	Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.	Province	Not used for U. S. Addresses, enter if necessary for foreign addresses.	Postal	Enter the zip code for U. S. Addresses or postal code for foreign addresses.	Phone	Enter the Home Phone number of the family member/beneficiary.
Address 1 Address 2 Address 3	Use these fields to enter the street address, P O Box, apartment number, etc.														
City	Enter the City														
County	Not used for U. S. Addresses, enter if necessary for foreign addresses.														
State	Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.														
Province	Not used for U. S. Addresses, enter if necessary for foreign addresses.														
Postal	Enter the zip code for U. S. Addresses or postal code for foreign addresses.														
Phone	Enter the Home Phone number of the family member/beneficiary.														
5	<p>Click the Personal Profile tab. This tab is used to designate BAH eligibility, provide Spouse-In-Service information, and record other personal information about the family member. Be sure to check the "Spouse-in-Service" block when the member's spouse is in any branch or component of the military.</p> <p><b>Note:</b> The Gender value defaults to Male and the Martial Status defaults to Single</p> <p>If you have just added or changed family member beneficiary information in the Name and address tabs, the data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active. <a href="#">View All</a> <a href="#">First</a>  1 of 6  <a href="#">Last</a>. Click on the View All link, Next Arrow button, or the Last link to view additional family members.</p>  <p>Complete the fields as indicated on the next page when adding family members/dependents.</p>														

## Personal Profile Tab Data Entry

Field	Description/Instructions
Birth date	The family member's/dependent's date of birth. This field must be completed if the dependent type is "Dependent" or "Depnd/Benf" (BAH Eligible).
Birth Country	The family member's/dependent's country of birth. Enter the standard three-letter country code (e.g. "USA" for United States of America). Click the  icon to lookup valid codes if necessary.
State Province	The family member's/dependent's state or province (Field label will change depending on the country code entered.) of birth. Enter the standard two-letter abbreviation. Click the  to lookup valid codes if necessary.
Birth Location	Enter the birth city.
BAH Eligible	<p>Click this checkbox if the member will be entitled to BAH with dependents for this family member. Also, click this checkbox even if the member's spouse, in a member-to-member marriage, is on active duty. The spouse in service block (see below) must be checked also.</p> <p><b>Before adding a BAH Eligible Family Member consult Chapter 3-F of the Coast Guard Pay Manual, COMDTINST M7220.29(series).</b></p> <p>If the person you are adding is a BAH eligible family member as outlined in the Coast Guard Pay Manual, then this box should be checked.</p> <p>If not a BAH eligible family member (i.e. a child over age 21 and not a full time student), this box should not be checked. <b>Exception:</b> <u>Check this block even if the spouse is an active duty service member.</u></p>
BAH Eligibility Date	<p>If adding a BAH Eligible Family member, enter the date:</p> <ul style="list-style-type: none"> <li>○ the member began support (e. g. Child's birth date)</li> <li>○ dependency was approved by PSC (LGL)</li> <li>○ of marriage</li> </ul> <p><b>Note:</b> If the date of marriage, child's date of birth, or dependency is prior to the member's accession date, then the date of accession should be used.</p>
Greater than 50% Support	Click this checkbox only when the family member does not reside with the member and receives more than 50% of their support from the member.
Gender	Choose the family member's gender from the drop-down list.
Marital Status	Chose the family member's marital status from the drop-down list.
Marital Status Date	<p>Enter the date corresponding to the martial status chosen above. May be left blank when the family member is single.</p> <p>Note: If adding a spouse, this is the date that will be shown as the Date of Marriage on the <a href="#">BAH Dependency Form</a></p>

## Dependency and Emergency Data

### Personal Profile Tab Data Entry (cont'd)

Field	Description/Instructions
Spouse in Service/Branch of Service	Spouse in Service. Click the checkbox if this family member is the member's spouse and is in the service. When you click this checkbox, a new drop-down menu item will appear from which to choose the branch of service. You must also enter the spouse's SSN in the National ID information below. <b>The BAH Eligible checkbox (above) must also be marked even if the spouse is on active duty.</b>
Student	Check this box when the family member is a child over age 21 but less than 23 attending school full time and is dependent of the member of over half of their support.
Student Status Date	Enter the date the student status became effective.
Disabled	Check this box when the family member is an incapacitated child over age 21
Smoker	Not used, leave blank
Occupation	Not used, leave blank
Medicare Entitled Date	Not used, leave blank
Riders/Orders	Not used
Phone Numbers	Click this link to add additional contact phone numbers for the family member.
National ID	This section is used to record the family member's Social Security Number (SSN). If the member's spouse is in the service, you must provide an SSN.
Country	Enter <b>USA</b>
National ID Type Description	Enter <b>PR</b> (for "Primary")
National ID	Enter the family member's SSN.
Primary ID	Check this box
Step	Action
6	<p>Click the  button.</p> <p>Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.</p> <p>Click  to proceed.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

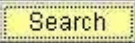


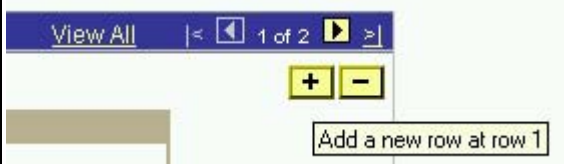
## Marriage, Divorce or Spouse's Death

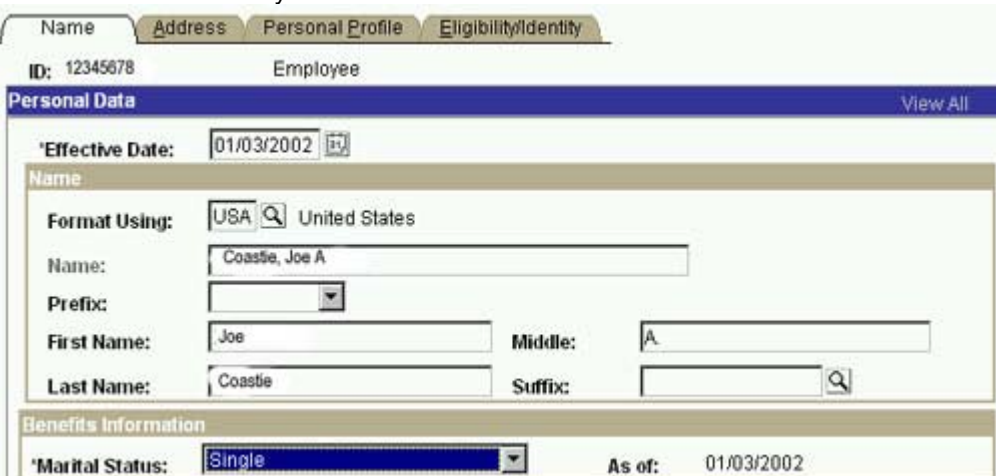



### Introduction:

This section provides the procedures for updating a member's marital status.

### Procedure:

Start [PeopleSoft, sign in](#) and follow these steps to view, enter or change a member's marital status.

Step	Action
1	<p>Click the Marriage, Divorce or Spouse's death link on the Dependency/Emergency Data Activity Guide.</p> <p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> <b>When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</b></p>
2	<p>The Employee Personal Data page will display. <b>If you are changing the member's marital status or adding a new address, click the  to begin a new transaction.</b> The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row.</p> 

Step	Action
3	<p>The member's marital status is shown on the first tab (Name tab of the Personal Data page).</p> <p>Reminder: If a member's marital status changes you must also update Employee Family Member and Beneficiary Information and Elections and Beneficiaries.</p>  <ul style="list-style-type: none"> <li>Enter the effective date of the change in the <b>Effective Date</b> field (dates are all numeric and are entered in MM/DD/YYYY format, click the  icon to look up the date if necessary). <b>Note: This is not the date that will be reflected as the Date of Marriage on the BAH/Dependency Data form. Update/correct the spouse's Marital Status Date if the BAH/Dependency Data form does not show the correct date.</b></li> <li>Choose the Marital Status from the drop down menu in the Benefits Information section of the page.</li> </ul> 
4	<p>Click  to save the information.</p>

You may now close the window to return to the Activity Guide to begin another transaction.



## SGLI and Dependent SGLI

### Introduction:

This section provides the procedures for entering a member's **SGLI** (*Servicemember's Group Life Insurance*) and Dependent SGLI elections.



After the data is entered and saved, PeopleSoft will generate **JUMPS** (*Joint Uniform Military Pay System*) transactions to start or stop deductions from the member's pay for SGLI premiums.

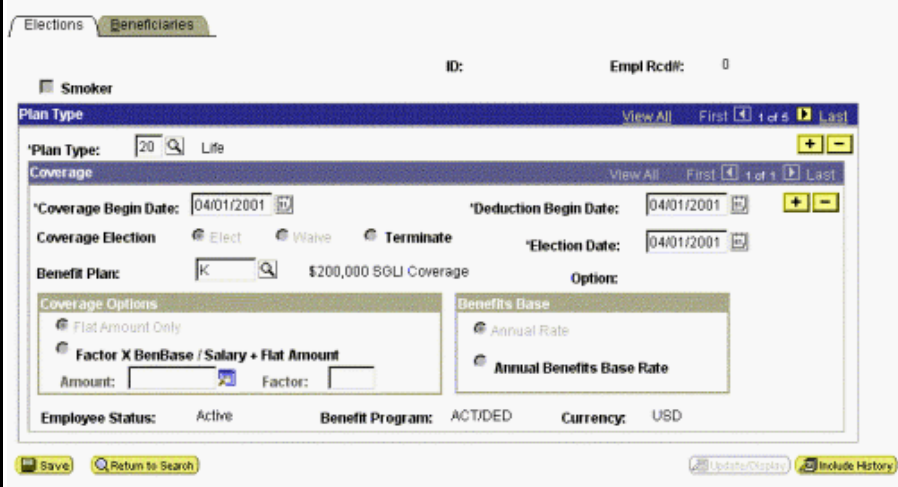
### Before You Begin:




**For SGLI elections, the beneficiaries information may be left blank.** SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. **However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.**




### Procedure



Follow these steps to enter SGLI elections.

Step	Action
1	Click the SGLI and Dependent SGLI link on the Dependency Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> <b>When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</b></p>
3	<p>The Life and AD/D Benefits page will display. There are two tabs on this page.</p> <ul style="list-style-type: none"> <li>• Elections</li> <li>• Beneficiaries</li> </ul>

Step	Action																		
3	<p>The Elections tab must be completed first and is displayed when the page opens.</p> <p><a href="#">Home</a> &gt; <a href="#">Compensate Employees</a> &gt; <a href="#">Administer Base Benefits</a> &gt; <a href="#">Use</a> &gt; <a href="#">Life and ADD Benefits</a></p>  <p><a href="#">Elections</a>   <a href="#">Beneficiaries</a></p>																		
4	<p>Click the "View All" link at the top of the page to display all the plan types the member has on file.</p> <p><a href="#">View All</a>   First 1 of 3 Last</p>																		
5	<p>Review the plan types the member has on file.</p> <table><tr><th>Plan Type</th><th>Title</th><th>Purpose</th></tr><tr><td>20</td><td>Life</td><td>SGLI on the life of the member</td></tr><tr><td>25</td><td>Dependent Life</td><td>SGLI on the life of the spouse</td></tr><tr><td>2A</td><td>Death Gratuity Benefit</td><td>Payment of Death Gratuity when there is no surviving spouse or children.</td></tr><tr><td>2B</td><td>Member Missing</td><td>Person to receive an allotment of funds if member is missing or unable to transmit funds.</td></tr><tr><td>2C</td><td>Unpaid Pay &amp; Allowances</td><td>Person(s) to receive unpaid pay &amp; allowances due the member at the time of death.</td></tr></table> <p>Plan Types 2A, 2B &amp; 2C will appear as choices but are not used in this procedure.</p>	Plan Type	Title	Purpose	20	Life	SGLI on the life of the member	25	Dependent Life	SGLI on the life of the spouse	2A	Death Gratuity Benefit	Payment of Death Gratuity when there is no surviving spouse or children.	2B	Member Missing	Person to receive an allotment of funds if member is missing or unable to transmit funds.	2C	Unpaid Pay & Allowances	Person(s) to receive unpaid pay & allowances due the member at the time of death.
Plan Type	Title	Purpose																	
20	Life	SGLI on the life of the member																	
25	Dependent Life	SGLI on the life of the spouse																	
2A	Death Gratuity Benefit	Payment of Death Gratuity when there is no surviving spouse or children.																	
2B	Member Missing	Person to receive an allotment of funds if member is missing or unable to transmit funds.																	
2C	Unpaid Pay & Allowances	Person(s) to receive unpaid pay & allowances due the member at the time of death.																	
<p>If the Plan Type you need to change is not listed, add it by clicking the uppermost <b>+</b> button to add new plan type.</p>																			

Step	Action										
4	 <p>&lt;--Add row button for new plan types</p> <p>&lt;--Add row button for new coverage elections within an existing plan type</p> <p>A new row will be inserted. The Plan Type will default to an existing plan type, click the  to lookup and change the Plan Type before continuing.</p> <p>If the Plan Type you need to change <b>is listed</b>, add a new coverage election by clicking the  in that Plan Type's row.</p> <p><b>Note:</b> If you are updated an existing election, and that election has not taken effect yet, you can make changes to it without first inserting a new row. If the Coverage Begin Date and Election Date fields are in the future, the election has not taken effect yet and can be changed.</p>										
6	<p>Complete the Coverage Election as follows.</p> <table border="1"> <thead> <tr> <th>Field</th><th>Description/Instructions</th></tr> </thead> <tbody> <tr> <td>Smoker</td><td>Not used, leave unchecked</td></tr> <tr> <td>Coverage Begin Date</td><td> <p>Coverage begin date is required when setting up a new Coverage Election.</p> <p><b>For SGLI/Family-SGLI plan types:</b> Enter the date the member signed the SGLV-8286 or SGLV-8286A form.</p> <p>Enter the date or use the date calendar icon to bring up the date screen.</p> </td></tr> <tr> <td>Deduction Begin Date</td><td>Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.</td></tr> <tr> <td>Coverage Election</td><td>'Elect' is the default choice and cannot be changed for any plan type.</td></tr> </tbody> </table>	Field	Description/Instructions	Smoker	Not used, leave unchecked	Coverage Begin Date	<p>Coverage begin date is required when setting up a new Coverage Election.</p> <p><b>For SGLI/Family-SGLI plan types:</b> Enter the date the member signed the SGLV-8286 or SGLV-8286A form.</p> <p>Enter the date or use the date calendar icon to bring up the date screen.</p>	Deduction Begin Date	Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.	Coverage Election	'Elect' is the default choice and cannot be changed for any plan type.
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Coverage Election	'Elect' is the default choice and cannot be changed for any plan type.										

Step	Action										
6	<div>Benefit Plan</div> <p>Click the  to lookup the Benefit Plan Code. SGLI has codes for coverage from \$0 (declined) to \$250K. Family Member SGLI has codes for coverage from \$0 (declined) to \$100K. The other plan types are not used (example for Family SGLI shown below):</p> <table> <tr> <th>Plan Type</th><th>Benefit Plan</th></tr> <tr> <td>Dependent Life (Family-SGLI)</td><td>                     0 Zero Option Family SGLI                      1 \$10,000 Family SGLI Coverage                      2 \$20,000 SGLI Family Coverage                      3 \$30,000 SGLI Family Coverage                      4 \$40,000 SGLI Family Coverage                      5 \$50,000 SGLI Family Coverage                      6 \$60,000 SGLI Family Coverage                      7 \$70,000 SGLI Family Coverage                      8 \$80,000 SGLI Family Coverage                      9 \$90,000 SGLI Family Coverage                      A \$100,000 SGLI Family Coverage                      Y - Administrative Stop. Can only be used by PSC Topeka.                 </td></tr> </table>	Plan Type	Benefit Plan	Dependent Life (Family-SGLI)	0 Zero Option Family SGLI 1 \$10,000 Family SGLI Coverage 2 \$20,000 SGLI Family Coverage 3 \$30,000 SGLI Family Coverage 4 \$40,000 SGLI Family Coverage 5 \$50,000 SGLI Family Coverage 6 \$60,000 SGLI Family Coverage 7 \$70,000 SGLI Family Coverage 8 \$80,000 SGLI Family Coverage 9 \$90,000 SGLI Family Coverage A \$100,000 SGLI Family Coverage Y - Administrative Stop. Can only be used by PSC Topeka.						
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	<div>Coverage Options</div> <p>These areas are not used.</p>										
	<div>Base Benefits</div>										
7	<p>Click the Beneficiaries tab to enter the member's beneficiary designations for the coverage you just added.</p> <p>For SGLI elections (for insurance on the life of the member), the beneficiaries information may be left blank. SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. <b>However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.</b></p> <p>Note: Before a person can be listed as a beneficiary you must add them using the <a href="#">Employee Family Member and Beneficiary Information</a> update/change process</p> <p>Complete the Beneficiary information as follows. Use the  and  buttons to add or remove beneficiary data rows.</p> <table> <tr> <th>Field</th><th>Description/Instructions</th></tr> <tr> <td>Plan Type</td><td>PeopleSoft populates the plan type from the Elections page. Click on <b>View All</b> and then use the scroll bar to view additional plan types.</td></tr> <tr> <td>Coverage Begin Date</td><td>PeopleSoft populates these fields from the selected coverage.</td></tr> <tr> <td>Effective Date</td><td></td></tr> <tr> <td>Benefit Plan</td><td></td></tr> </table>	Field	Description/Instructions	Plan Type	PeopleSoft populates the plan type from the Elections page. Click on <b>View All</b> and then use the scroll bar to view additional plan types.	Coverage Begin Date	PeopleSoft populates these fields from the selected coverage.	Effective Date		Benefit Plan	
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Coverage Begin Date	PeopleSoft populates these fields from the selected coverage.										
Effective Date											
Benefit Plan											

Step	Action	
7	Distribution By Law	Default value is Checked upon entry into the Coast Guard. This is used when no beneficiary is actually selected for the applicable benefit plan.
	Beneficiary ID	Click the  for a listing of available beneficiaries. If the beneficiary is not listed, you will have to add them using the <a href="#">Employee Family Member and Beneficiary Information</a> update/change process. <b>Note: You must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.</b>
	Percent of Benefit	Percent of the benefit amount is must equal 100% for all Plan Types except Family Member SGLI, it will be blank, and Member Missing, it can be less than 100%.
	Flat Amount	Not used, leave blank.
	Payment Method	For SGLI, choose Lump Sum or Equal Payments as indicated on the member's SGLV-8286 form. All other Plan Types are Lump Sum.
	Excess	Not used, leave unchecked.
	Contingent	If this beneficiary is not the primary beneficiary, check this field. Whenever this field is checked, you must list a principle beneficiary or beneficiaries.
	Totals	PeopleSoft populates based on the sum of the values entered in the Percent of Benefit field for Primary and Contingent beneficiaries. The totals must equal 100% in order to save the data
8	Click  to save your changes. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.	

You may now close the window and return to the Activity Guide to begin another transaction.

## Print BAH/Dependency Form

### Introduction:

This section provides the procedure to print a BAH/Dependency/ form for an individual. A report, listing all the members at a unit and their BAH eligible family members is also available. See the [Print Dependency Data By Unit](#) topic for more information.

The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.


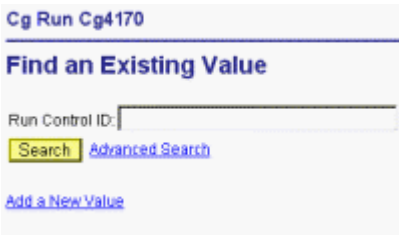
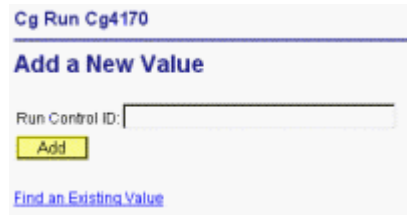




### Sample report

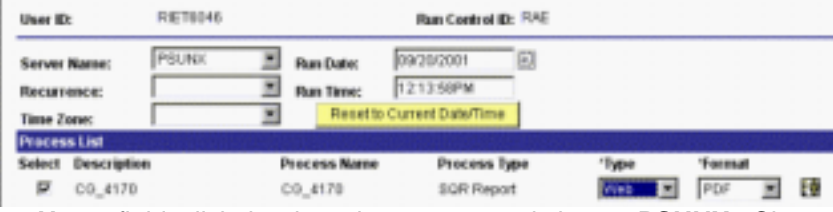
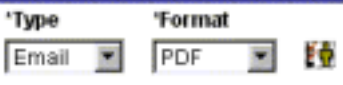




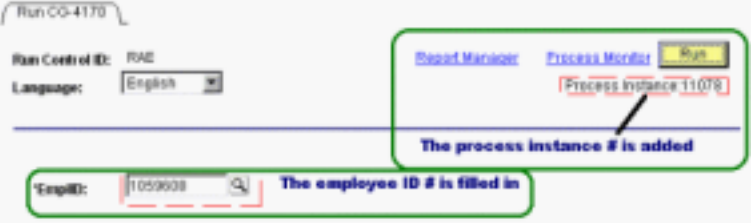
DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD COMPUTER GENERATED		<b>BAH/DEPENDENCY DATA</b>	
EMPLID 900930	NAME Smith, John S.	RATERANK Chief Boatswain's Mate	CURRENT DUTY STATION 000000 - CGC UNDERWAY
SERVICING PERSON 000269 - CG GP CHARLESTON		MARITAL STATUS Married	DATE OF MARPAGE 10-JAN-1999
SPOUSE IN SERVICE INFORMATION			
<b>DEPENDENCY DATA</b>			
NAME: Smith, Joan T.	DATE OF BIRTH: 15-AUG-1948	DEPENDENCY DATE: 10-JAN-1999	SOCIAL SECURITY NUMBER: 1612070
BAH/ELIGIBLE DEPENDENT: YES			RELATIONSHIP: Spouse
NAME: Smith, John A.	DATE OF BIRTH: 22-AUG-1948	DEPENDENCY DATE: 22-AUG-1999	SOCIAL SECURITY NUMBER: 123456789
BAH/ELIGIBLE DEPENDENT: YES			RELATIONSHIP: Son
NAME: Smith, Jane, D.	DATE OF BIRTH: 30-MAY-1968	DEPENDENCY DATE: 30-MAY-1999	SOCIAL SECURITY NUMBER: 987654321
BAH/ELIGIBLE DEPENDENT: YES			RELATIONSHIP: Daughter
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:
BAH/ELIGIBLE DEPENDENT:			RELATIONSHIP:
<b>FOR CG PERSONNEL SERVICE CENTER USE ONLY</b>			
The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M220.29(series). The family member(s) listed below are approved for BAH eligibility commencing on the date(s) indicated:			
NR:	DATE:	NR:	DATE:
NR:	DATE:	NR:	DATE:
PSC APPROVAL SIGNATURE:		DATE:	
<b>MEMBER'S CERTIFICATION</b>			
By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of \$10,000 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 267). I further certify that I have reviewed all entries on this form and by signature below, the information contained herein is correct.			
SIGNATURE OF MEMBER:		DATE:	

CHANGES - Previous editions are obsolete.

## Procedure:

Follow these steps print a BAH/Dependency Data form.

Step	Action
1	Click the Print a BAH/Dependency Form link on the <a href="#">Dependency and Emergency Data Activity Guide</a>
2	<p>The Run Control ID Entry Page will appear.</p> <p><b>If you have used this process before</b>, enter your initials in the Run Control ID block and click the  button.</p>  <p><b>If this is the first time you have used this process</b>, click the <a href="#">Add a New Value</a> link.</p>  <ol style="list-style-type: none"> <li>1. Enter your initials in the Run Control ID block.</li> <li>2. Click the  button.</li> </ol>
3	<p>The CG-4170 Run page will display.</p>  <ol style="list-style-type: none"> <li>2. Enter the Employee ID of the member you want to generate a CG-4170A for. <ul style="list-style-type: none"> <li>You can use the  button to lookup the EmplID if necessary. See Search Tips for help.</li> </ul> </li> <li>2. Click the  button to begin processing.</li> </ol>

Step	Action
4	<p>The Process Scheduler Request page will display.</p>  <p>In the <b>Server Name</b> field, click the drop-down menu and choose <b>PSUNX</b>. Change the <b>*Type</b> field to "<b>Email</b>". Set the <b>*Format</b> field to "<b>PDF</b>".</p>  <p>If you selected <b>Email</b> you can click on the Distribution icon  to add additional addresses and customized the email message. This step is not necessary if you have your business email address entered in the system, the report will automatically be mailed to your business email address. Use this feature if you want to email the report to other addresses. The Distribution Detail page will display, scroll down to the <b>E-Mail Only</b> section and enter the subject, text and e-mail address for the message:</p>  <p>Insert additional email addresses in the <b>Email Address List</b> box. Separate entries with a (;) e.g. "jjohnson@unit.uscg.mil;tsmith@unit.uscg.mil".</p> <p>Click  to continue. You will be returned to the Process Scheduler Request page.</p> <p>Click  on the Process Scheduler Request page.</p>
5	<p>The Run CG-4170 page will display again. A "Process Instance" number will appear under the <a href="#">Process Monitor</a> link and the Employee ID number will show in the EmplID field.</p>  <p>If you selected "<b>Email</b>" for the type, you may exit the application. The CG-4170A should arrive via e-mail within a few minutes.</p>
6	<p>Close the Report and Process Monitor windows then select another activity from the <a href="#">Dependency and Emergency Data Activity Guide</a> page.</p>



## Print BAH/Dependency Forms for a Unit

### Introduction

This section provides the procedure for running the BAH/Dependency Data form. The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.

*Sample page from report*

DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD COMPUTER GENERATED		<b>BAH/DEPENDENCY DATA</b>	
EMPID: 100000	NAME: Smith, John S.	DATE/GRK: Chief Boatswain's Mate	CURRENT DUTY STATION: 000000 - CGC UNDERWAY
SERVICING PERSON: 000269 - CG GP CHARLESTON		MARITAL STATUS: Married	DATE OF MARRIAGE: 10-JAN-1989
SPOUSE IN-SERVICE INFORMATION			
<b>DEPENDENCY DATA</b>			
NAME: Smith, Joan T.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 15-AUG-1968	DEPENDENCY DATE: 10-JAN-1989
			SOCIAL SECURITY NUMBER: 99121272
			RELATIONSHIP: Spouse
NAME: Smith, John A.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 22-AUG-1994	DEPENDENCY DATE: 22-AUG-1999
			SOCIAL SECURITY NUMBER: 123456789
			RELATIONSHIP: Son
NAME: Smith, Jane, D.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 30-MAY-1998	DEPENDENCY DATE: 30-MAY-1998
			SOCIAL SECURITY NUMBER: 987654321
			RELATIONSHIP: Daughter
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:

**FOR CG PERSONNEL SERVICE CENTER USE ONLY**

The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M7220.29(series). The family member(s) listed below are approved for BAH eligibility commencing on the date(s) indicated:

NBR:	DATE:	NBR:	DATE:	NBR:	DATE:
NBR:	DATE:	NBR:	DATE:	NBR:	DATE:

PSC APPROVAL SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**MEMBER'S CERTIFICATION**






By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of \$10,800 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 287). I further certify that I have reviewed all entries on this form and by signature below, the information contained hereon is correct.



SIGNATURE OF MEMBER: \_\_\_\_\_ DATE: \_\_\_\_\_




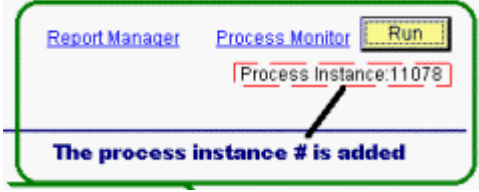
COMPGEN - Previous editions are obsolete.

## Procedure




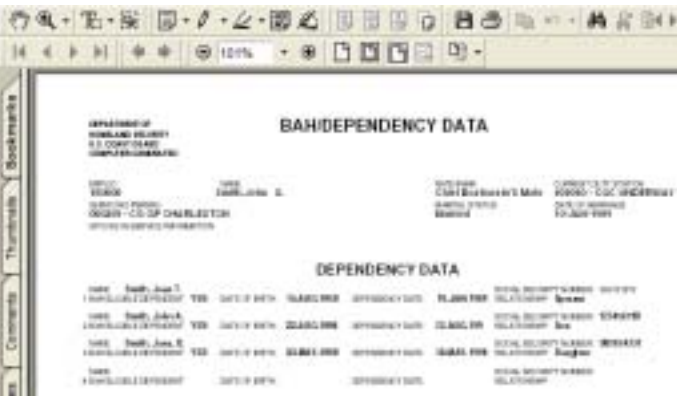
Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.

Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p><a href="#">Administer Workforce</a> &gt; <a href="#">Administer Workforce (GBL)</a> &gt; <a href="#">Use Dependency/Emergency Data</a></p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the <a href="#">Print a BAH/Dependency Form for a Unit</a> link</p> 
3	<p>The Run Control ID Entry Page will open in a new window..</p> <p><b>If you have used this process before</b>, enter your initials in the Run Control ID block and click the  button.</p>  <p><b>If this is the first time you have used this process</b>, click the <a href="#">Add a New Value</a> link.</p>  <ol style="list-style-type: none"> <li>1. Enter your initials in the Run Control ID block.</li> <li>2. Click the  button.</li> </ol>

Step	Action																																	
4	<div>The Run page will display.</div> <div></div> <div><div>1. Enter the Department ID of the unit you want to generate forms for.</div><div><ul style="list-style-type: none"><li>You can use the  button to lookup the Department ID if necessary. See Search Tips for help.</li><li>Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs</li></ul></div><div><div>Example search by OPFAC</div><div><div>Home &gt; Administer Workforce &gt; Administer Workforce (DE)</div><div><div>Lookup DeptID</div><div>Search By: <div>Operational Facility Code</div></div><div>Operational Facility Code: <div>71108</div></div><div><div>Lookup</div><div>Cancel</div><div>Advanced Lookup</div></div><div><div>Search Results</div><div><div>View All</div><table><tr><th>Operational Facility Code</th><th>Department</th><th>Description</th></tr><tr><td><a href="#">71108</a></td><td>000493</td><td>CGO EIGHT</td></tr><tr><td><a href="#">71108</a></td><td>002494</td><td>D8 PUBLIC AFFAIR</td></tr><tr><td><a href="#">71108</a></td><td>002495</td><td>D8 C3/IRM STAFF</td></tr><tr><td><a href="#">71108</a></td><td>002496</td><td>D8 PLANNING OFI</td></tr><tr><td><a href="#">71108</a></td><td>002497</td><td>D8 OPERATIONS I</td></tr></table></div></div></div></div><div><div>Example search by description</div><div><div>Search By: <div>Description</div></div><div>Description: <div>%D8</div></div><div><div>Lookup</div><div>Cancel</div><div>Advanced Lookup</div></div><div><div>Search Results</div><div><div>View All</div><table><tr><th>Description</th><th>Department</th><th>Comp</th></tr><tr><td><a href="#">CGO8 OPERATTACH STAFF</a></td><td>004424</td><td>CGA</td></tr><tr><td><a href="#">D8 ADMIN DIVISION (A)</a></td><td>002502</td><td>CGA</td></tr><tr><td><a href="#">D8 ATON&amp;WY MGMT BRNCH</a></td><td>002499</td><td>CGA</td></tr><tr><td><a href="#">D8 BRIDGES (OB)</a></td><td>002500</td><td>CGA</td></tr></table></div></div></div></div><div>2. Click the <div><div>Run</div></div> button to begin processing.</div></div></div>	Operational Facility Code	Department	Description	<a href="#">71108</a>	000493	CGO EIGHT	<a href="#">71108</a>	002494	D8 PUBLIC AFFAIR	<a href="#">71108</a>	002495	D8 C3/IRM STAFF	<a href="#">71108</a>	002496	D8 PLANNING OFI	<a href="#">71108</a>	002497	D8 OPERATIONS I	Description	Department	Comp	<a href="#">CGO8 OPERATTACH STAFF</a>	004424	CGA	<a href="#">D8 ADMIN DIVISION (A)</a>	002502	CGA	<a href="#">D8 ATON&amp;WY MGMT BRNCH</a>	002499	CGA	<a href="#">D8 BRIDGES (OB)</a>	002500	CGA
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Step	Action
5	<p>The Process Scheduler Request page will display</p> 
6	<p>Select <b>Web</b> from the Process Type drop down menu.</p> 
7	<p>Select <b>PDF</b> from the Format drop down menu.</p>  <p><b>PDF = Adobe Acrobat</b></p>
8	<p>Click the <b>OK</b> button to launch the process and return to the Process Scheduler Request page.</p>
9	<p>Click the <a href="#">Process Monitor</a> link in the upper right-hand corner of the Process Scheduler Request page.</p> 

Step	Action														
10	<p>The Process Monitor page will display. Click the <b>Refresh</b> button periodically until the <b>Run Status</b> shows "<b>Success</b>" and the <a href="#">Details</a> link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.</p> <div><p><a href="#">Home</a> &gt; <a href="#">PeopleTools</a> &gt; <a href="#">Process Monitor</a> &gt; <a href="#">Inquire</a> &gt; <a href="#">Process Requests</a></p><div><div>Process List</div><div>Server List</div></div><p>View Process Request For</p><div><div>User: RIET6046</div><div>Type:</div><div>Last: 1 Days</div><div>Refresh</div></div><div><div>Server: PSUNX</div><div>Run Status:</div><div>Instance:</div><div>to</div></div><div><input type="checkbox"/> View Job Items</div><table><thead><tr><th>Instance Seq</th><th>Process Type</th><th>Process Name</th><th>User</th><th>Run Date/Time</th><th>Run Status</th><th>Details</th></tr></thead><tbody><tr><td>476108</td><td>SQR Report</td><td>CGASQRPT</td><td>RIET6046</td><td>01/28/2003 15:07:59 EST</td><td>Success</td><td><a href="#">Details</a></td></tr></tbody></table></div>	Instance Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details	476108	SQR Report	CGASQRPT	RIET6046	01/28/2003 15:07:59 EST	Success	<a href="#">Details</a>
Instance Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details									
476108	SQR Report	CGASQRPT	RIET6046	01/28/2003 15:07:59 EST	Success	<a href="#">Details</a>									
11	<p>Click the <a href="#">Details</a> link. The Process Detail Page will display. Click the <a href="#">View Log/Trace</a> link.</p> <div><p><b>Process Detail</b></p><div><div>Process</div><div><div>Instance: 476108</div><div>Type: SQR Report</div><div>Name: CGASQRPT</div><div>Description: CGASQRPT</div></div></div><div><div>Run</div><div>Update Process</div></div><div><div>Run Control ID: RAE</div><div>Location: Server</div><div>Server: PSUNX</div><div>Recurrence:</div><div><div>Hold Request</div><div>Queue Request</div><div>Cancel Request</div><div><b>Delete Request</b></div><div>Restart Request</div></div></div><div><div>Date/Time</div><div>Actions</div></div><div><div>Request Created On: 01/28/2003 15:14:55 EST</div><div>Run Anytime After: 01/28/2003 15:07:59 EST</div><div>Began Process At: 01/28/2003 15:15:01 EST</div><div>Ended Process At: 01/28/2003 15:15:10 EST</div><div><div><a href="#">Parameters</a></div><div><a href="#">Message Log</a></div><div>Batch Timings</div><div><a href="#">View Log/Trace</a></div><div>Transfer</div></div><div><div>OK</div><div>Cancel</div></div></div></div>														

Step	Action
12	<p>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, <a href="#">cg4170dp_610219.PDF</a> is the link to the report).</p>  <p><b>Note:</b> You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to.</p>
13	<p>Your report will open and display in the web browser. Use the buttons   in the Adobe Acrobat reader to save or print the report.</p> 
14	Close the Report and Process Monitor windows
15	Select another activity from the <a href="#">Dependency and Emergency Data Activity Guide</a> page.

## Update a Person's Emergency Contact Information



This section provides the procedures for adding, updating and removing Emergency Contacts for members who do not have access to PeopleSoft self-service.

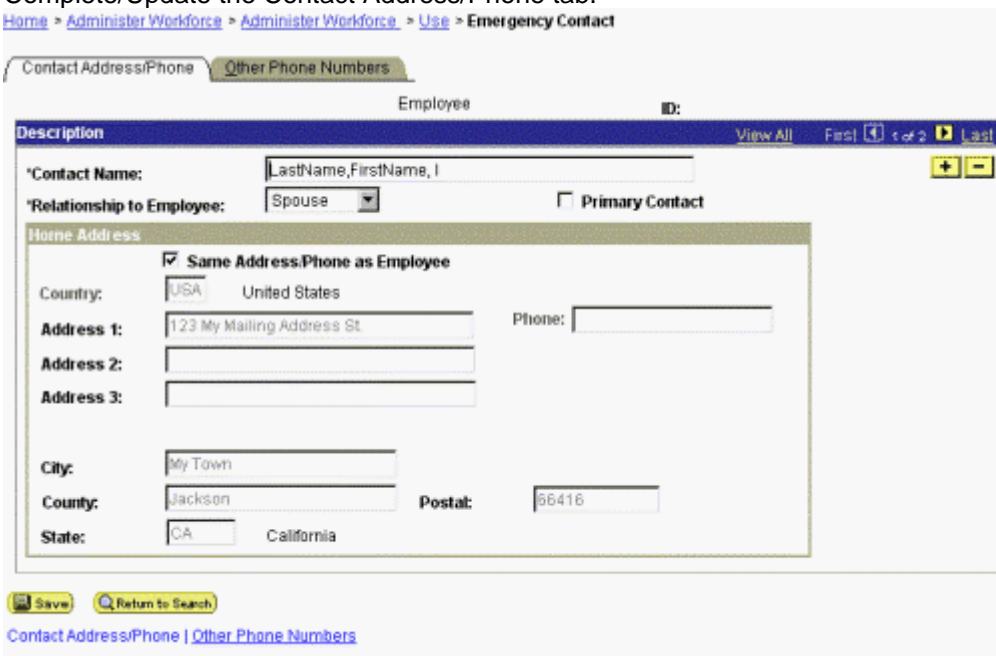






Emergency Contacts are persons, the member designates, who are to be contacted in the event of an emergency. Any person entered as an emergency contact may be contacted in the event the "Primary" contact cannot be reached.

Emergency contact information will be printed on the Emergency Contact Information report. The report can be printed for an [individual](#) or for [all members of a unit](#).






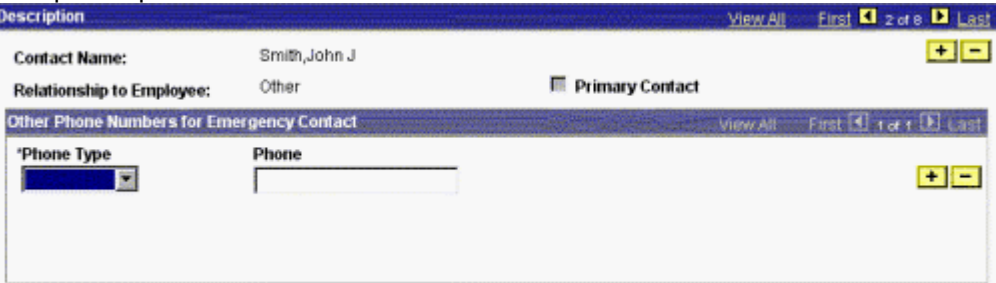


### Procedure

Follow these steps to update Emergency Contact information.


Step	Action
1	Click the Update a Person's Emergency Contact Information link on the Dependency/Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> <b>When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</b></p>
3	<p>The Employee Emergency Contact page will display. There are two tabs on this page.</p> <ol style="list-style-type: none"> <li>1. The Contact Address/Phone tab (displayed first) allows you to enter the Emergency Contact's name, relationship to the member and address.</li> <li>2. The Other Phone Numbers tab allows you to enter the Emergency Contact's phone numbers.</li> </ol>

Step	Action														
4	<p>Complete/Update the Contact Address/Phone tab.</p> <p><a href="#">Home</a> &gt; <a href="#">Administer Workforce</a> &gt; <a href="#">Administer Workforce</a> &gt; <a href="#">Use</a> &gt; <a href="#">Emergency Contact</a></p>  <table border="1"> <thead> <tr> <th>Field/Button or Link</th><th>Description/Instructions</th></tr> </thead> <tbody> <tr> <td><a href="#">View All</a></td><td>If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.</td></tr> <tr> <td></td><td>If you are adding an additional Emergency Contact, click this button to insert a new row</td></tr> <tr> <td></td><td>If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.</td></tr> <tr> <td>Contact Name</td><td>Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J</td></tr> <tr> <td>Relationship to Employee</td><td>Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.</td></tr> <tr> <td>Primary Contact (checkbox)</td><td>Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.</td></tr> </tbody> </table>	Field/Button or Link	Description/Instructions	<a href="#">View All</a>	If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.		If you are adding an additional Emergency Contact, click this button to insert a new row		If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.	Contact Name	Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J	Relationship to Employee	Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.	Primary Contact (checkbox)	Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.
Field/Button or Link	Description/Instructions														
<a href="#">View All</a>	If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.														
	If you are adding an additional Emergency Contact, click this button to insert a new row														
	If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.														
Contact Name	Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J														
Relationship to Employee	Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.														
Primary Contact (checkbox)	Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.														



Step	Action		
4	Same Address/Phone as Employee (checkbox)	Check this box if the Emergency Contact and member reside at the same address. The remainder of the address information will automatically be filled in.	
	Country 	Defaults to USA. Click the  to lookup country codes for other countries if the Emergency Contact does not reside in the USA.	
	Address (1 through 3)	Enter the mailing address (street, P. O. Box number, etc.) on these lines.	
	Phone	Enter the primary daytime telephone number for the Emergency Contact. Additional phone number can be entered on the next tab.	
	City/Province	This field will change from City to Province depending on the country selected. Enter the city or province Emergency Contact's mailing address.	
	County	Not required. Enter the county if known	
	Postal	Enter the Zip or Postal code.	
	State 	Enter the standard two-letter state abbreviate code. Click the  to lookup codes if necessary.	
5	Click the Other Phones Tab to enter additional phone numbers for this emergency contact or click the  button if there are no additional phone numbers or Emergency Contacts to be added.		
6	Complete/Update the Additional Phone Numbers tab. 		
Field/Button or Link			Description/Instructions
<a href="#">View All</a>			If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts
			If you are adding an additional Emergency Contact, Phone Number and a blank row is not already displayed, click this button to insert a new row
			If you are removing a Emergency Contact phone, click this button to delete the row.
Phone Type (drop-down menu)			Click the drop-down menu for a list of phone types. Click on a phone type to select it.
Phone			Enter the phone number, area code first.

## Dependency and Emergency Data

Step	Action
7	<p>Click the Contact Address Phone Tab to enter additional Emergency contacts or click the  button if there are no additional phone numbers or Emergency Contacts to be added.</p> <p>Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

## Print Emergency Contact Information By Employee ID

### Introduction

This section provides the procedure for printing a member's emergency contact information. The report includes the names, addresses, phone numbers of people the member has designated to be notified in the event of an emergency.

```

Department of Homeland Security      EMERGENCY CONTACT INFORMATION
U.S. Coast Guard
Computer-Generated

EMPLID: 1234567      Rank/Rate: YN1/E6      Name: Smith, Sean T.
Duty Station: 000652-CG ISC ST LOUIS      Servicing HR Site: 000652-CG ISC ST LOUIS
Marital Status: Married

```

---

```

In case of emergency, please notify the following people:

Primary Contact:
Name: Smith, Teresa W      Relationship: Spouse
Address: 123 Any Street      Phone: 555/555-1212
        TOPEKA, KS 666144017

Other Phones:
Type      Number
Business  555/555-1235
Home      555/555-1234

Other Contacts:
Name: Smith, Kirk A.      Relationship: Father
Address: 400 Oak Tree Lane #2      Phone: 354/223-1234
        ANYCITY, LA 70000

Other Phones:
Type      Number
Home      354/223-1234

Name: Jones, Lindamarie A.      Relationship: Mother
Address: 222 MY STREET      Phone: 555/123-1234
        HOUSTON, TX 77042

Other Phones:
Type      Number
Business  555/461-4444
Cellular  555/123-5595
Home      555/123-1234

Name: Smith, Jeffrey P.      Relationship: Son
Address: 123 Any Street 312      Phone: 555/555-6114
        TOPEKA, KS 666144017

Name: Smith, Marcus P.      Relationship: Next of Kin
Address: 3202 CATFISH HOLLOW LANE      Phone: 098/555-3456
        HOUSTON, TX 77082

Other Phones:
Type      Number
Business  555/555-3456
Home      098/555-3456



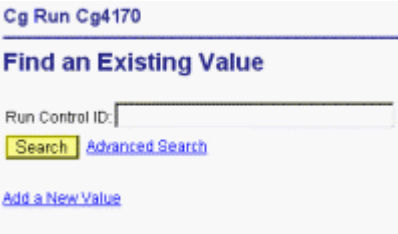
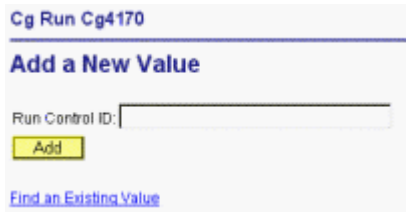
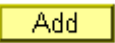
```




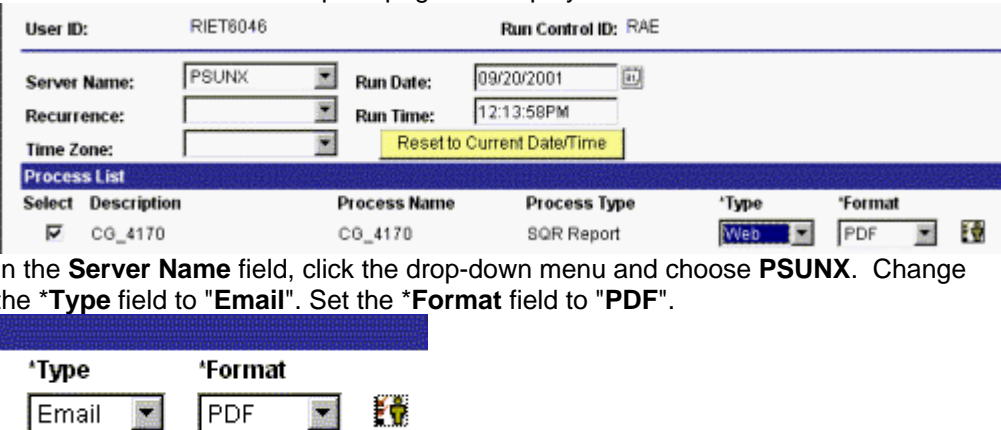

Sample report.

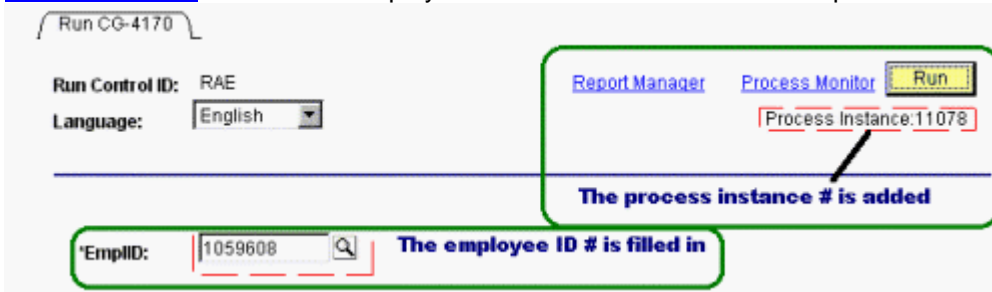
Date Printed: 10/08/2003

## Procedure

Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.

Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p><a href="#">Administer Workforce</a> &gt; <a href="#">Administer Workforce (GBL)</a> &gt; <a href="#">Use Dependency/Emergency Data</a></p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the <a href="#">Print Emergency Contact Information by EMPLID</a> link</p> <p> <a href="#">Print Emergency Contact Information by EMPLID</a> Use this link to print a specific person's Emergency Contact Information form.</p>
3	<p>The Run Control ID Entry Page will open in a new window.</p> <p><b>If you have used this process before</b>, enter your initials in the Run Control ID block and click the  button.</p> <p> &lt;-Initials</p> <ul style="list-style-type: none"> <li>• <b>If this is the first time you have used this process</b>, click the <a href="#">Add a New Value</a> link.</li> </ul> <p></p> <ol style="list-style-type: none"> <li>1. Enter your initials in the Run Control ID block.</li> <li>2. Click the  button.</li> </ol>

Step	Action
4	<p>The Run page will display.</p>  <ol style="list-style-type: none"> <li>Enter the Employee ID of the member you want to generate an Emergency Contact listing for. <ul style="list-style-type: none"> <li>You can use the  button to lookup the EmpID if necessary. See Search Tips for help.</li> </ul> </li> <li>Click the  button to begin processing.</li> </ol>
5	<p>The Process Scheduler Request page will display.</p>  <p>In the <b>Server Name</b> field, click the drop-down menu and choose <b>PSUNX</b>. Change the <b>*Type</b> field to <b>"Email"</b>. Set the <b>*Format</b> field to <b>"PDF"</b>.</p> <p><b>Note:</b> You can select the "WEB" type if you would rather have the report available on the Reports Server. See the Using Process Scheduler Web Option topic for more information.</p> <p>If you selected <b>Email</b> you can click on the Distribution icon  to add additional addresses and customized the email message. This step is not necessary if you have your business email address entered in the system, the report will automatically be mailed to your business email address. Use this feature if you want to email the report to other addresses.</p> <p>The Distribution Detail page will display, scroll down to the <b>E-Mail Only</b> section and enter the subject, text and e-mail address for the message:</p>

Step	Action
5	<p><b>Email Only</b></p> <p><b>Email Subject:</b>  <input type="text" value="This is the Subject Line of the E-Mail Message"/></p> <p><b>Message Text:</b>  <input type="text" value="Enter any message text you would like to add to the E-mail."/></p> <p><b>Email With Log</b> <input type="checkbox"/></p> <p><b>Email Address List:</b>  <input type="text" value="your_email@your_email_address.mil"/></p> <p>Insert additional email addresses in the <b>Email Address List</b> box. Separate entries with a (;) e.g. "jjohnson@unit.uscg.mil;tsmith@unit.uscg.mil.</p> <p>Click <b>OK</b> to continue. You will be returned to the Process Scheduler Request page.</p> <p>Click <b>OK</b> on the Process Scheduler Request page.</p>
6	<p>The Run page will display again. A "Process Instance" number will appear under the <a href="#">Process Monitor</a> link and the Employee ID number will show in the EmplID field.</p>  <p>The screenshot shows the 'Run' page with the following elements: 'Run CG-4170' at the top, 'Run Control ID: RAE' and 'Language: English' on the left, and a 'Process Monitor' section on the right. The 'Process Monitor' section has a 'Run' button and displays 'Process Instance: 11078'. Below this, a green box highlights the text 'The process instance # is added'. At the bottom, the 'EmplID' field contains '1059608' and is highlighted with a green box, with the text 'The employee ID # is filled in' next to it.</p> <p>If you selected <b>"Email"</b> for the type, you may exit the application by closing the window and returning to the Activity Guide. The report should arrive via e-mail within a few minutes.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

## Print Emergency Contact Information for a Unit

### Introduction

This section provides the procedure for running the Emergency Contact Data report. The report includes the names, addresses, phone numbers of people the member has designated to be notified in the event of an emergency.

```

Department of Homeland Security      EMERGENCY CONTACT INFORMATION
U.S. Coast Guard
Computer-Generated

EMPLID: 1234567      Rank/Rate: YN1/E6      Name: Smith, Sean T.
Duty Station: 000652-CG ISC ST LOUIS      Servicing HR Site: 000652-CG ISC ST LOUIS
Marital Status: Married
  
```

---

In case of emergency, please notify the following people:

```

Primary Contact:
Name: Smith, Teresa W      Relationship: Spouse
Address: 123 Any Street      Phone: 555/555-1212
        TOPEKA, KS 666144017
  
```

```

Other Phones: Type      Number
               Business  555/555-1235
               Home      555/555-1234
  
```

```

Other Contacts:
Name: Smith, Kirk A.      Relationship: Father
Address: 400 Oak Tree Lane #2      Phone: 354/223-1234
        ANYCITY, LA 70000
  
```

```

Other Phones: Type      Number
               Home      354/223-1234
  
```

```

Name: Jones, Lindamarie A.      Relationship: Mother
Address: 222 MY STREET      Phone: 555/123-1234
        HOUSTON, TX 77042
  
```

```

Other Phones: Type      Number
               Business  555/461-4444
               Cellular  555/123-5595
               Home      555/123-1234
  
```

```

Name: Smith, Jeffrey P.      Relationship: Son
Address: 123 Any Street 312      Phone: 555/555-6114
        TOPEKA, KS 666144017
  
```

```

Name: Smith, Marcus P.      Relationship: Next of Kin
Address: 3202 CATFISH HOLLOW LANE      Phone: 098/555-3456
        HOUSTON, TX 77082
  
```

```





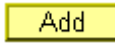
Other Phones: Type      Number
               Business  555/555-3456
               Home      098/555-3456
  
```

Date Printed: 10/08/2003






Sample report.


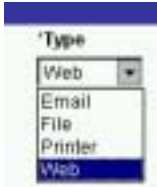
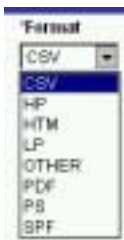


## Procedure

Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.





Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p><a href="#">Administer Workforce</a> &gt; <a href="#">Administer Workforce (GBL)</a> &gt; <a href="#">Use Dependency/Emergency Data</a></p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the <a href="#">Print Emergency Contact Information for a Unit</a> link</p> <p> <b><a href="#">Print Emergency Contact Information for a Unit</a></b>  Use this link to print all of the Emergency Contact Information forms for a particular unit.</p>
3	<p>The Run Control ID Entry Page will open in a new window.</p> <p><b>If you have used this process before</b>, enter your initials in the Run Control ID block and click the  button.</p> <div data-bbox="329 865 730 1096"> <p>Cg Run Cg4170</p> <p><b>Find an Existing Value</b></p> <p>Run Control ID: <input type="text"/></p> <p> <a href="#">Advanced Search</a></p> <p><a href="#">Add a New Value</a></p> </div> <p style="margin-left: 400px;">&lt;-Initials</p> <ul style="list-style-type: none"> <li>• <b>If this is the first time you have used this process</b>, click the <a href="#">Add a New Value</a> link.</li> </ul> <div data-bbox="329 1234 738 1449"> <p>Cg Run Cg4170</p> <p><b>Add a New Value</b></p> <p>Run Control ID: <input type="text"/></p> <p></p> <p><a href="#">Find an Existing Value</a></p> </div> <ol style="list-style-type: none"> <li>1. Enter your initials in the Run Control ID block.</li> <li>2. Click the  button.</li> </ol>



Step	Action
4	<p>The Run page will display.</p>  <p>1. Enter the Department ID of the unit you want to generate forms for.</p> <ul style="list-style-type: none"> <li>You can use the  button to lookup the Department ID if necessary. See Search Tips for help.</li> <li>Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs</li> </ul> <p><b>Example search by OPFAC</b></p>  <p><b>Example search by description</b></p>  <p>2. Click the  button to begin processing.</p>

Step	Action
5	<p>The Process Scheduler Request page will display</p> 
6	<p>Select <b>Web</b> from the Process Type drop down menu.</p> 
7	<p>Select <b>PDF</b> from the Format drop down menu.</p>  <p><b>PDF = Adobe Acrobat</b></p>
8	<p>Click the <b>OK</b> button to launch the process and return to the Process Scheduler Request page.</p>
9	<p>Click the <a href="#">Process Monitor</a> link in the upper right-hand corner of the Process Scheduler Request page.</p> 
10	<p>The Process Monitor page will display. Click the <b>Refresh</b> button periodically until the <b>Run Status</b> shows "<b>Success</b>" and the <a href="#">Details</a> link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.</p> 

Step	Action
11	<p>Click the <a href="#">Details</a> link. The Process Detail Page will display. Click the <a href="#">View Log/Trace</a> link.</p> <p><b>Process Detail</b></p> <p><b>Process</b></p> <p>Instance: 476108      Type: SQR Report  Name: CGASQRPT      Description: CGASQRPT</p> <p><b>Run</b>      <b>Update Process</b></p> <p>Run Control ID: RAE      <input type="radio"/> Hold Request  Location: Server      <input type="radio"/> Queue Request  Server: PSUNX      <input type="radio"/> Cancel Request  Recurrence:      <input checked="" type="radio"/> <b>Delete Request</b>  <input type="radio"/> Restart Request</p> <p><b>Date/Time</b>      <b>Actions</b></p> <p>Request Created On: 01/28/2003 15:14:55 EST      <a href="#">Parameters</a>      Transfer  Run Anytime After: 01/28/2003 15:07:59 EST      <a href="#">Message Log</a>  Began Process At: 01/28/2003 15:15:01 EST      Batch Timings  Ended Process At: 01/28/2003 15:15:10 EST      <a href="#">View Log/Trace</a></p> <p><input type="button" value="OK"/>    <input type="button" value="Cancel"/></p>

Step	Action												
12	<p>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, <a href="#">cg4170dp_610219.PDF</a> is the link to the report).</p> <div><div></div><div><div>Report/Log Viewer</div><div></div></div></div> <div><div><div>Instance:</div><div>610219</div><div>Type:</div><div>SQR R</div></div><div><div>Name:</div><div>CG4170DP</div><div>Run Cntl ID:</div><div>RAE</div></div><div><div>Status:</div><div>Success</div><div>Submitted By:</div><div>RIET60</div></div><div><div>Server:</div><div>PSUNX</div><div>Recurrence:</div><div></div></div></div> <div>CG4170DP</div> <table><thead><tr><th>Name</th><th>Size</th><th>CreationDate</th></tr></thead><tbody><tr><td><a href="#">Message Log</a></td><td>1308 bytes</td><td>2003-10-07 16:47:40</td></tr><tr><td><a href="#">Trace File</a></td><td>87 bytes</td><td>2003-10-07 16:47:40</td></tr><tr><td><a href="#">cg4170dp_610219.PDF</a></td><td>23959 bytes</td><td>2003-10-07 16:47:40</td></tr></tbody></table> <p><b>Note:</b> You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to.</p> <div><div><div>610219.PDF</div><div>23959</div><div>2003-10-07 16:47:40</div></div><div><div>Open</div><div>Open in New Window</div><div>Save Target As...</div><div>Print Target</div><div>Cut</div><div>Copy</div></div></div>	Name	Size	CreationDate	<a href="#">Message Log</a>	1308 bytes	2003-10-07 16:47:40	<a href="#">Trace File</a>	87 bytes	2003-10-07 16:47:40	<a href="#">cg4170dp_610219.PDF</a>	23959 bytes	2003-10-07 16:47:40
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13	<p>Your report will open and display in the web browser. Use the buttons   in the Adobe Acrobat reader to save or print the report.</p>												
14	Close the Report and Process Monitor windows												
15	Select another activity from the <a href="#">Dependency and Emergency Data Activity Guide</a> page.												